

COMPARISON OF INNOVATION SCHOOLS, PILOT SCHOOLS, HORACE MANN CHARTER SCHOOLS AND COMMONWEALTH CHARTER SCHOOLS

Category	Innovation Schools	Pilot Schools[1]	Horace Mann Charter Schools[2]	Commonwealth Charter Schools
AUTHORIZING LEGISLATION				
	G.L. c. 71, s. 92 (regulations pending)	Local Contract	G.L. c. 71, s. 89 (603 CMR 1:00)	G.L. c. 71, s. 89 (603 CMR 1:00)
APPROVAL PROCESS AND OVERSIGHT				
Approval Process	Applicant submits prospectus to screening committee that includes the superintendent, school committee member, and union representative; develops innovation plan with stakeholders; and secures approval by the local school committee (the approval process is entirely locally based).	Pilot Schools require approval of the local district superintendent and school committee.	Board of Elementary and Secondary Education (BESE), local teachers' union, and local school committee approval are required for traditional Horace Mann charter schools. Teachers' union approval is not required for conversions and 14 new Horace Mann schools. The charter is granted to an independent board of trustees at each school.	Approval by BESE is required, and the charter is granted to an independent board of trustees at each school.
Oversight/ Evaluation	Local superintendent conducts an annual evaluation to assess progress with regard to stated goals in the innovation plan.	In Boston, the superintendent and the Boston Teachers Union (BTU) Steering Committee have oversight authority.	BESE has oversight authority.	BESE has oversight authority.
Authority to Conduct School Evaluation	Superintendent has complete authority, unless otherwise stated within the innovation plan.	The governing board with local superintendent has final authority.	The school's board of trustees has complete authority.	Board of trustees has complete authority.
Accountability	The innovation plan, which includes information about the areas of autonomy/flexibility, related strategies that will be implemented in the school, and performance benchmarks, is approved and renewed by school committee for up to 5 years. If benchmarks are not met school committee can amend the innovation plan or revoke the authorization of the school.	A School Quality Review is conducted every five years, and the BPS/BTU have developed an intervention process for schools of concern.	Charter renewal every five years by BESE; BESE can impose conditions and/or probation on renewal and require that certain benchmarks be met.	Charter renewal every five years by BESE; BESE can impose conditions and/or probation on renewal and require that certain benchmarks be met.
Audit	There is no requirement for an annual audit, as general school funds are managed by the local district.	There is no requirement for an annual audit, as general school funds are managed by the local district.	An independent entity must conduct an annual audit and produce a report, as school funds are managed by the school and its board of trustees.	An independent entity must conduct an annual audit and produce a report, as school funds are managed by the school and its board of trustees.

[1] Pilot schools are locally authorized with no formal state involvement. Currently, there are 23 pilot schools in MA (located in Boston, Springfield and Fitchburg), the majority of which are in Boston.

[2] The new Achievement Gap legislation, Chapter 12 of the Acts of 2010, created three variations of the Horace Mann (HM) model: the traditional HM; the conversion HM; and 14 new Horace Mann schools, four of which must be in Boston.

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APPROVAL PROCESS AND OVERSIGHT				
Contractual Work Conditions	Waivers from and/or modifications to collective bargaining agreements must be described within the innovation plan. In the case of a conversion, the innovation plan requires 2/3 approval of teachers in that school; in the case of a new school, the terms of the innovation plan must be negotiated with the local teacher union. If an agreement cannot be reached, an expedited arbitration process is described in the statute.	These schools are exempt from most work conditions in local contract. In Boston, the contract requires compensation for time worked over 95 hours above the BTU contract. All other work conditions at the school level are defined in a work agreement.	Traditional Horace Mann schools must have an MOU (in which any modifications to or waivers from collective bargaining agreements are detailed) that is submitted to the BESE along with the charter application. Conversion schools require MOUs to be approved by a majority faculty vote. The 14 “new” Horace Mann schools require negotiation and approval of the MOU after the charter is awarded; if agreement is not reached at least 30 days before scheduled opening, the school will operate under the terms of its charter until an agreement is reached.	Teachers are not required to be union members, but have the option of retaining membership or joining the local union if desired. The charter application and school policies define work conditions for staff members.
UNION AND DISTRICT				
School Committee/District Policies	Any modifications to or exemptions from school committee policies and district regulations must be described in the innovation plan.	Pilot Schools are exempt from school committee policies and district regulations.	Horace Mann charter schools are exempt from school committee policies and district regulations in accordance with charter statute.	Commonwealth charter schools are exempt from school committee policies and district regulations in accordance with charter statute.
Grievances	Any modifications to or exemptions from school committee policies and district regulations must be described in the innovation plan.	Each Pilot School must have in place an dispute resolution process, approved by the governing board, that a teacher and staff members may use.	Typically covered by collective bargaining agreement, which governs unless arrangement is modified by an MOU.	Grievance procedures may be developed at each school.
FUNDING				
Facilities	Facilities are provided by the local district, unless otherwise specified in the innovation plan.	Pilot Schools do not pay for the facility if housed in city-owned building, but they must pay for the facility if housed in a non-city owned building.	Facilities costs are negotiated by school board of trustees and local school committee; for example, the school does not pay for the facility if housed in city-owned building, but must pay for facility if housed in non-city owned site (with approval of school committee).	The school must pay for its facility.

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FUNDING				
Teacher Hiring/ Salary Level	Certified teachers are employed, and salaries must be addressed in the innovation plan.	Certified teachers are employed at the district salary level.	Certified teachers are employed at the district salary level.	Teachers' salary levels are determined by the school. Teachers must meet federal requirements regarding highly qualified instructors, but are not required to be certified; however, ELL teachers must be licensed.
State/Federal Grants	State and federal grants, such as Title I and IDEA grants, will be received through the local school district. However, the operators have the authority to secure supplemental funding to implement the innovation plan.	State and federal grants, such as Title I and IDEA grants, will be received through the local school district.	State and federal grants are received directly by each school.	State and federal grants are received directly by each school.
Funding Formula	Innovation Schools must receive the same per pupil allocation as other district schools receive, and funds may carry over from year to year.	Pilot Schools receive a lump sum per pupil funding formula based on district average cost per pupil for all students, excluding out-of-district placements and students with extraordinary needs.	Each school's annual appropriation is an amount agreed upon by the school and the school committee (the appropriation must be comparable to district school funding).	Each school receives student tuition directly from the state based on the statutory formula.
Central Discretionary Services	Schools can address this topic in their innovation plan.	Select discretionary central office services may be purchased, or the per pupil funds may be added to its lump sum budget.	Each school has greater choice regarding a range of discretionary central office services to purchase the services or add the per pupil funds to its budget (the arrangement can be negotiated by the school board of trustees and local school committee).	Not applicable, as the schools operate separately from the school district.
PERSONNEL				
Teacher Evaluation System	This issue is not addressed in the Innovation Schools statute, but the school could propose its own teacher evaluation system in the innovation plan.	Pilot Schools voluntarily agreed to use the BPS evaluation procedure for teachers, but they may also establish separate and additional teacher evaluation processes.	Typically covered by collective bargaining agreement, which governs unless arrangement is modified by an MOU.	Teacher evaluation systems can be developed by each school.
Lay-offs	This issue is not addressed in the Innovation Schools statute, but it could be addressed in the innovation plan.	Lay-offs are affected by personnel "bumping" during time of lay-off.	Horace Mann schools are exempt from personnel "bumping" during the time of lay-off.	Not applicable, as the schools operate separately from school districts.

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ENROLLMENT				
<i>Projected enrollment</i>	This issue is not addressed in the Innovation Schools statute, but it can be addressed in the innovation plan.	If a Pilot School falls below 5% of its projected enrollment, it must repay the district the per pupil differential below the 5%. Likewise, if a Pilot School exceeds its projected enrollment by 5%, the BPS adds to its budget the per pupil differential above 5%.	Maximum enrollment is established in the charter application and as granted by BESE.	State tuition payments are based on actual enrollment. Maximum enrollment is established in the charter application and as granted by BESE.
<i>Admissions</i>	Existing students in the school prior to conversion to Innovation School status have the right to continue to attend. Otherwise, the school operators and leaders include the admissions process in the innovation plan.	Elementary and middle schools must use the district lottery process. High schools may use a common Pilot application and their own admissions process, but may not screen for academic achievement.	The schools must have an open application process, and a lottery must be held if the number of applicants exceeds available spaces.	The schools must have open application process, and a lottery must be held if number of applicants exceeds spaces. Note: additional recruitment and retention requirements for new schools are specified in <i>An Act relative to the achievement gap</i> , S. 2247.
SCHOOL DATA				
<i>MCAS</i>	MCAS results published as a school within the local district.	MCAS results are published as school within district.	MCAS results are published as a separate local education agency.	MCAS results are published as a separate local education agency.
<i>Report Cards & Diplomas</i>	This issue is not addressed in the Innovation Schools statute, but it can be addressed in the innovation plan.	Report cards and diplomas are administered by the school district.	Each school administers its own report cards and diplomas unless the school chooses to have district administer them.	Each school administers its own report cards and diplomas.